

VIDEO AGE

international

MOVIE

In This Issue:
I Love Lucy
AFM "Loews" SM
MIP Marries ATF
Speeches That Last

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It's a Jungle Out There: Finding Revenue In All The Right Places

By DOM SERAFINI

As we know, the major studios have the product to attract buyers (both in terms of quality and quantity). That's why they don't have to sell, but merely take orders. But what about the indies? What do they have to do to navigate and find revenue in the jungle that the TV business has become?

Unfortunately their findings will amount to what the studios have left for them: Basically 20 percent of the business divided among 10 mini-majors and some 500 smaller companies worldwide.

Naturally, trying to maximize rights exploitation and figuring out what can be held back is time-consuming and at times offers few results, but if producers and distributors are shut out from



(Continued on Page 24)

U.S. Studios See NATPE As a "Definite Maybe"

If NATPE could attract more European, Canadian and Asian-Pacific buyers, the U.S. studios would most likely abandon all other pre-Los Angeles Screenings markets to focus on the Miami, Florida market in

January. Better yet, if the market were held in mid-February, the timing would be perfect for mid-season replacement series and new winter productions. And, the very fact that NATPE is taking place at the beginning of a new budget year makes it ideal for any kind of negotiations.

According to a former U.S. studio president, the

NATPE board has entertained the idea of moving its dates to mid-February. Reportedly, it's a move that would have been supported by the large studios, but to date nothing has been decided.

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Mexico's Rich Market Worth Fighting Over

By BOB JENKINS

Mexico is a rich economy, which makes it a good advertising market. Its economy is the second largest in South America and the 13th largest in the world. It is also a market in which television dominates advertising, with 58 percent of all Mexican advertising being claimed by the two commercial broadcast groups: Televisa and

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Miami Warms Up NATPE Spirits

Execs hesitant to make harsh comments

By SARA ALESSI

It seems like hardly anyone is homesick for NATPE in Las Vegas. This year, the premier U.S. TV market returns to Miami Beach, Florida, and while many of the execs *VideoAge* surveyed were happy about the sub-tropical location, few were ready to criticize the NATPE organization over last year's shortcomings.

Most execs stopped short after expressing their satisfaction with the new venue. Susan Waddell, CEO of U.K.-based Power said, "The move to Miami was definitely for the best and has really increased the reach of the market." She elaborated that it "has really increased [NATPE's] accessibility and enticed even more buyers, as it takes place right at the beginning of the Latin American sales cycle. This makes it a great opportunity to establish new relationships and negotiations."

Marcel Vinay Jr. at Mexico's Comarex/Azteca, was hopeful that the market would improve in 2012. "Let's hope it is

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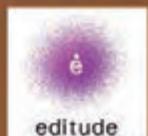
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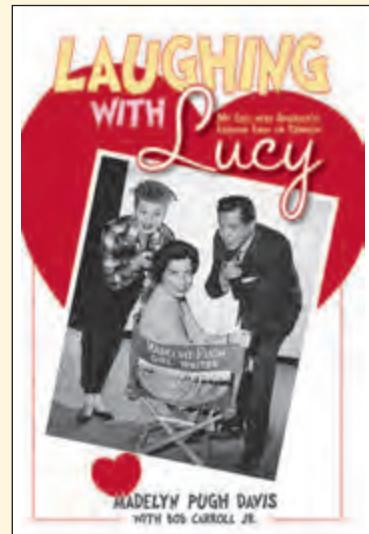


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Caracol's Santo Domingo Dies

Colombia's billionaire broadcaster and owner of Caracol Televisión Julio Mario Santo Domingo died last October at age 87 in New York. According to *VideoAge's* January 2011 Issue, Santo Domingo's fortune was worth \$8.4 billion, making him the

first Colombian to achieve world-class wealth. At the zenith, sales from his Santo Domingo group equaled four percent of Colombia's national output.

He met his first wife, to whom he was married for five years, while living in Paris, but returned to Colombia in 1948. In the 1960s, Santo Domingo merged his father's beer company, Cervecería Águila, with Bavaria, the national beer company. Although it took 40 years to fully execute, eventually the holding led to a controlling 75 percent stake. Bavaria promptly held a

monopoly over Colombia's beer industry, with operations in Peru, Panama and Ecuador as well. Diversification included cars, petrochemicals and telecoms, Avianca (the world's second oldest airline) and Caracol radio and television.

Santo Domingo was also interested in newspapers, and in 1997, he saved *El Espectador*, Colombia's second newspaper, from financial ruin. He was educated in Bogotá, Colombia, Europe and the U.S., and he spoke six different languages.

In the late 1970s, Santo Domingo served as Colombia's first ambassador to China, and beginning in the 1980s, he spent more time in New York than in Colombia.

His first son, Julio Mario Santo Domingo Braga, died of cancer in 2009. He's survived by his second wife, Beatrice Davila, and two sons, Alejandro and Andrés.

Taking A Stand Against Piracy

Creative America — a grassroots organization based in Toluca Lake, California that brings together the entertainment community and others — is taking a stand against content theft, or piracy, seeking industry-wide support through their website (creativeamerica.org) and advertisements placed in consumer publications. According to Creative America, by trafficking stolen film and television, as well as other creative content, content thieves threaten the livelihood of those in the entertainment industry. In addition, such theft undermines the legitimate services that have been created to provide television and film content online.

Piracy is a widespread problem. As just one example of content theft, according to the organization, on October 9, NBC Sports' Sunday Night Football began airing at 8:30p.m. on U.S. television, and by 8:40p.m., it was already being streamed illegally.

Creative America unites actors, directors, editors, cinematographers, craft professionals, small businesses that service the industry, studio employees, publications such as *VideoAge*, and others who work in and are passionate about film, TV and other creative industries. Members of the coalition include: American Federation of Television and Radio Artists, CBS Corporation, the Directors Guild of America, IATSE International, NBC Universal, the Screen Actors Guild, Sony Pictures Entertainment, Twentieth Century Fox, Viacom, the Walt Disney Company and Warner Bros. Entertainment.

Additionally, the Independent Film & Television Alliance (IFTA), which represents the interests of the independent film sector and organizes the American Film Market, confirmed its support for bipartisan legislation in the U.S. to stop online piracy. The Stop Online Piracy Act would give the U.S. Attorney General the ability to shut down foreign websites that steal American-made films, TV shows and other content. The IFTA sent a letter to House (Congress) Judiciary Committee Chairman Lamar Smith and Ranking Member John Conyers, offering to work with them to help pass the legislation.

AFM "Loews" Santa Monica

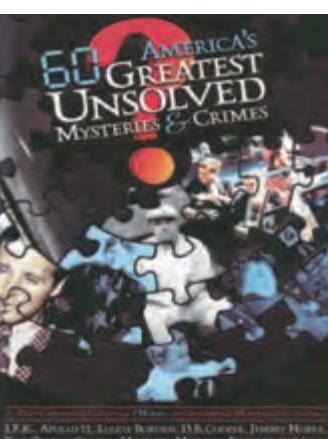
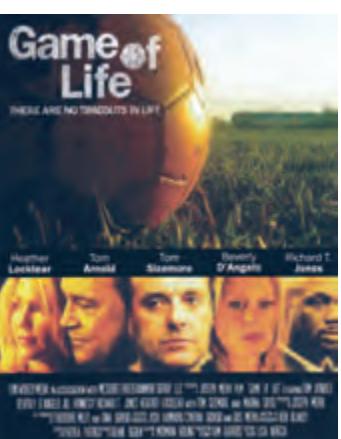
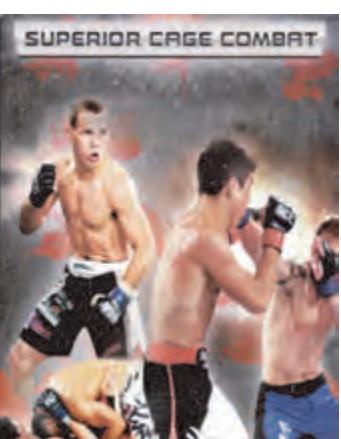
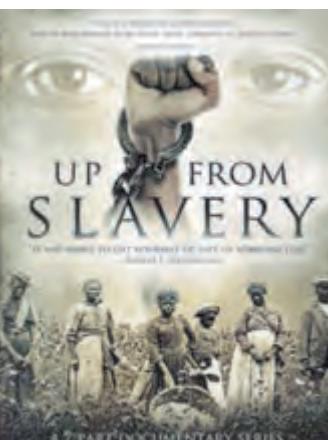
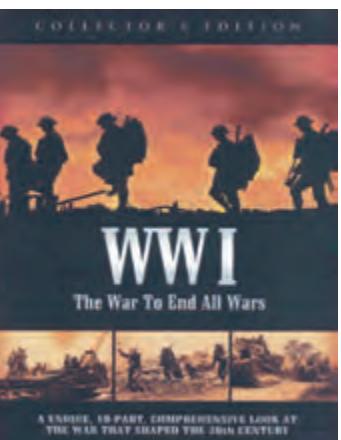
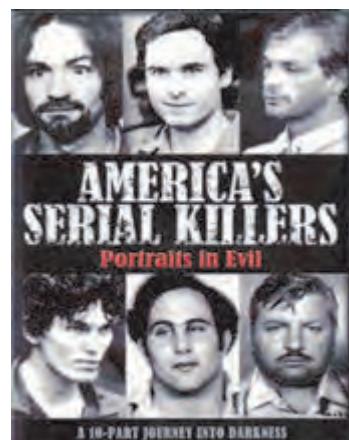
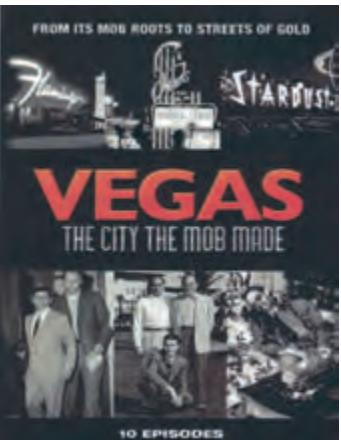
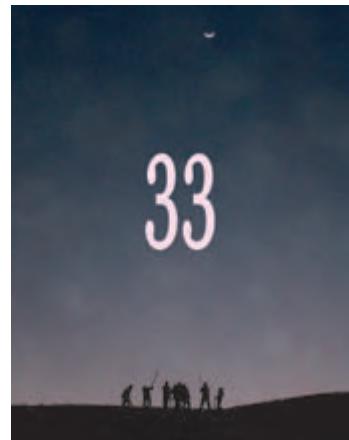
Last month, the Los Angeles-based Independent Film & Television Alliance (IFTA) announced that its American Film Market (AFM) will remain in Santa Monica, California through 2017.

The IFTA arranged for the AFM to



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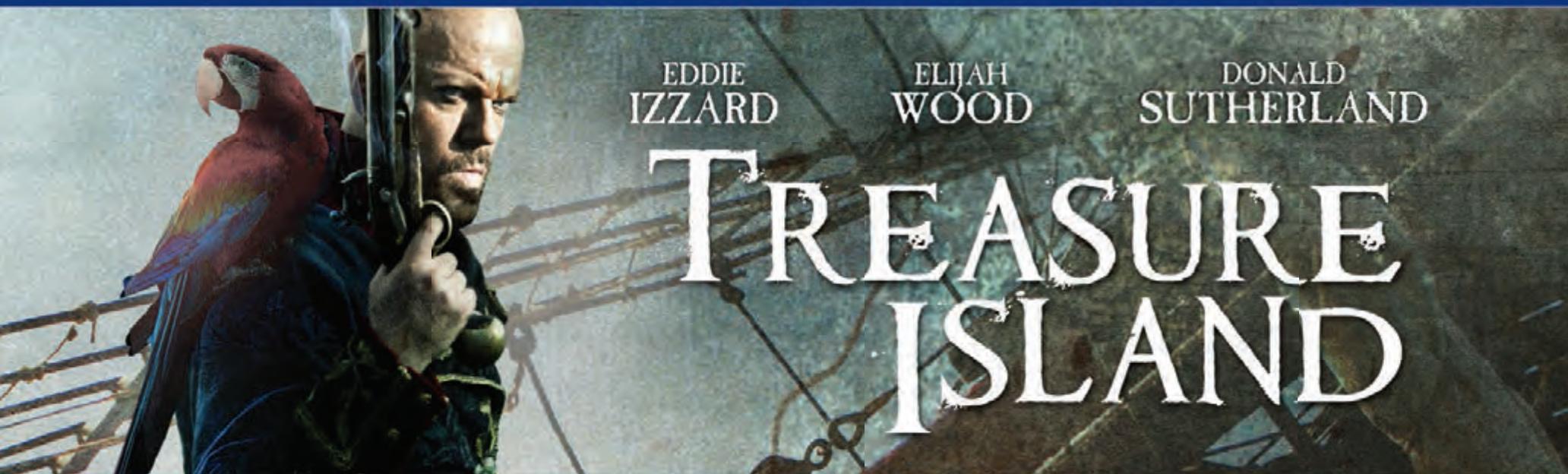
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return to the Loews Santa Monica Beach Hotel with additional exhibition space at JW Marriott's Le Merigot Beach Hotel once again and conferences continuing at the Fairmont Miramar Hotel & Bungalows.

Fearing escalating prices from the Loews Hotel, which serves both as the market headquarters and main exhibition area, AFM organizers had entertained bids from other nearby locations, including L.A. Live, a large entertainment complex in downtown

Los Angeles, but ultimately decided to remain in Santa Monica.

AFM has been held at the Loews Santa Monica Beach Hotel since 1991 and the market's organizers hope to take advantage of future improvements coming to Santa Monica.

AMC Entertainment is developing a new cinema complex consisting of 12 screens and an IMAX theater slated to open in late 2014 or 2015. Additionally, AFM will be able to use the Santa Monica Civic Auditorium, which will accommodate 2,000 people, for red carpet premieres, once the renovation is complete in late 2014.

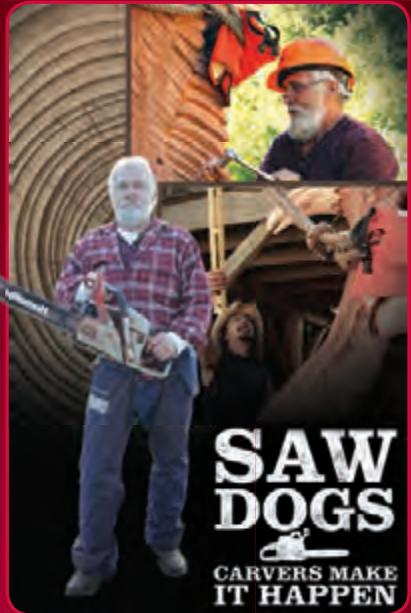
Other changes in the area include the addition of 700 hotel rooms opening in the downtown area, including rooms in mid-priced hotels such as the Marriott and Hampton Inn; a light Metro Rail terminal at Fourth Street and Colorado

Avenue, connecting Santa Monica to L.A. and Hollywood that is expected to be running in 2015, and a seven-acre park directly across from the Loews Hotel, to be completed in 2014.

The confirmed dates for AFM in Santa Monica are: October 31-November 7, 2012; November 6-13, 2013; November 5-12, 2014; November 4-11, 2015; November 2-9, 2016 and November 1-8, 2017.



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Finland's Yle Finds New Funds

ast month, the Finnish public broadcasting company Yle expressed satisfaction with the new license fee model that was negotiated by the country's Minister of Housing and Communications, Krista Kiuru, and a group of parliamentary politicians. The new long-term financial and administrative model, which will go into effect next year, will replace the current license fee method, which has been in place for over 80 years.

Beginning in 2013, Yle will be funded by a fee collected by the Finnish tax authorities. The fee will be progressive and specific to each taxpayer. On average, the fee will be reduced by more than 80 euro per household each year, because more households will contribute to the fee. For single person households, the fee will be cut in half, while low-income households will not be liable to pay. In the future, the money will also be directed into a special radio and television fund.

Under the current system, a quarter of Finnish households do not pay for Yle's services, despite the fact that everyone uses them.

Yle broadcasts on four TV channels and six radio channels. It operates in 30 different areas and offers services in Finnish, Swedish and Sami.

Ant3-La Sexta On-Off Merger

After a two-year courtship, Spanish TV broadcasters Antena3 and La Sexta have finally agreed to merge. So far though, only Ant3's board has approved the deal, which has yet to go before Ant3 shareholders, La Sexta's board and the country's regulatory authority.

Ant3 is Spain's third largest TV network by audience, while La Sexta is the fifth largest. According to the agreement, La Sexta shareholders are expected to get at most a 14 percent stake in the merged company. They would receive the first seven percent immediately, while the remaining seven percent stake would be dependent upon whether the merger reached financial targets by 2016. In addition, Ant3 would take on La Sexta's €100 million (U.S.\$130 million) debt.

Spain's largest advertising group has opposed the deal, arguing that the merger would leave Spain's TV market controlled by two companies: the newly merged entity and Mediaset España Comunicación. The Antena3-La Sexta Merger and Mediaset España-Cuatro would control 85.6 percent of the advertising market if the deal were approved.



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The Woman Behind *I Love Lucy*

The long-running U.S. and international hit TV series *I Love Lucy* aired on CBS from 1951-1957, and ever since the first episode finished in the top 10 of ratings, it was clear that the show would be a success.

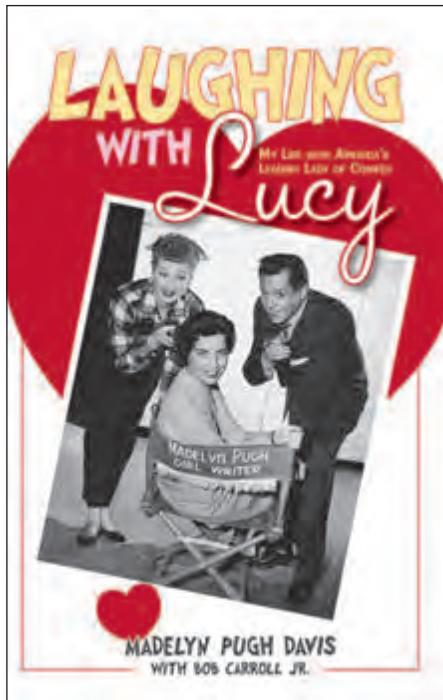
The groundbreaking show — which starred Lucille Ball and her real life husband Desi Arnaz as Lucy and Ricky Ricardo — has never been off the air, and it marked its 60th anniversary in 2011. The very same year, Lucille Ball would have celebrated her 100th birthday in August, and Madelyn Pugh Davis, the only female writer on staff for the iconic series, passed away in April. So, *VideoAge* decided it was the perfect time to take a look at Davis' memoir *Laughing With Lucy: My Life with America's Leading Lady of Comedy* (Emmis Books, 271 pages, \$19.95), and remind folks exactly why everybody loves *Lucy*, from the viewpoint of the woman who — along with a team of writers that included first Bob Carroll Jr. and producer Jess Oppenheimer, and later writers Bob Schiller and Bob Weiskopf — wrote the gags that have made TV audiences laugh for the past six decades.

Lucy's ratings success continued throughout its run, and in 1953, the episode in which Little Ricky is born recorded a 71.1 Nielsen rating, translating to approximately 44 million viewers. The sitcom continues to air in about 80 countries and has been dubbed in 22 languages.

As the late Davis stated in her 2005 memoir, which she penned with longtime writing partner Bob Carroll Jr., "Who could ever imagine that the name of the show would be a prophecy, and everybody *would* love Lucy?"

It has been widely reported that Davis and the other writers helped bring Lucy Ricardo to life, since Ball has often been described as serious and strong-willed. At times, Ball even argued against scenes that ultimately became hits. However, on many occasions, the star recognized Davis' talent and her great contribution to the show's success.

Throughout the book, Davis demonstrates how writers and performers complement each other, revealing that both Ball and Arnaz recognized the



hard work she and the other writers pored into the scripts. Davis herself acknowledges that the scripts could never have succeeded without the actors' talent and enthusiasm for the material she produced. According to Davis, "Bob and I have always attributed a great deal of the success of *I Love Lucy* to the fact that Lucy would do absolutely anything we could dream up, and Desi would pay for it." It was crucial that the four actors on the show "shared an absolute belief in the material we gave them," she stated.

Davis also reveals insight into Ball, who did not naturally have Lucy Ricardo's zany personality. It was Ball's hard work and dedication that helped her make the most of the scripts. "She was a perfectionist, and if she had to work with a difficult prop, she always wanted the prop there the first day of rehearsal so she could get used to it," and learn to use it incorrectly to pull off the funniest gags.

Despite the light-hearted nature of the book, Davis tastefully addresses a serious topic that deserves attention: Discrimination against women during the early years of television. Drawing from her own personal experiences and those of other female writers, Davis reveals that women were treated like intruders in a men's club, and were often ignored. When she applied to an all-male comedy writing team, they

"explained that they weren't going to hire me because 'you wouldn't fit in, you're a girl.'" Around the *Lucy* set, Davis was known as "Girl Writer," in a world in which comedy shows were typically written by "groups of men who were known as 'The Boys.'" One of her unofficial duties as "Girl Writer" was to monitor Ball's wardrobe for malfunctions as she performed various stunts, and to test stunts to ensure that a woman could perform them without injuring herself.

As Davis rose to new heights in her career, the discrimination did not diminish: "I felt some prejudice against me when I became a producer. There was a tendency to regard me as invisible and ignore me." However, she does note that many more women had jobs in the industry in the 1970s and 1980s than when she started in the 1950s.

At the very beginning of the book, Davis warns readers: "you won't learn any juicy gossip from me because I think it's tacky to write that sort of thing about people after they have died and can't deny it." Plus, she added, "Bob [Carroll Jr.] and I were always the last to hear gossip anyway because we were off in our little office writing dialogue." Although this might disappoint some readers, Davis does reveal a small, juicy nugget: Even after Ball and Arnaz divorced, she could always tell when Arnaz was speaking to Ball on the phone because of the loving tone in his voice.

Davis makes up for the shortage of gossip by bringing the show and its characters, Lucy and Ricky Ricardo and Ethel and Fred Mertz, as well as the actors who portrayed them — Ball, Arnaz, Vivian Vance and William Frawley — to life by reproducing dialogue and reprinting excerpts of the scripts. While some die-hard fans (like this reviewer!) may know the reprinted lines by heart, others will welcome the refresher, which helps them envision the scenes in their charming black and white. Davis uses the scripts to reveal some of her favorite moments from the series, sharing one of her all-time favorite lines, when Ethel says of husband Fred: "If there's one thing Fred isn't, and there's only one thing Fred isn't, it's a chicken thief."

In case readers find it difficult to picture the scenes in their minds, the pages are littered with relevant images, including stills from the shows, backstage photos, and even some of Davis' private family photos. She uses the photos to emphasize important points, providing an image of Lucy and Ricky after they dance the tango and Lucy smashes dozens of raw eggs in her shirt. Davis informs readers that, at 65 seconds, this was the longest laugh ever recorded on *I Love Lucy*.

Among the photos readers likely haven't seen is one of Davis and Carroll testing out a scene from an episode of *The Lucy-Desi Comedy Hour*, in which Davis goes completely limp and Carroll attempts to dress her in a coat. Ball and guest star Paul Douglas later acted out this scene to perfection. Plus, there is an entire section of images at the center of the book titled "The Lucy Gallery" that is sure to entertain, with the pictures serving as an added personal touch.

It is a real pleasure to read Davis' summaries of the various episodes because they underscore the pride she took in her work, showcasing the details that are most important to her. For example, readers learn that, "Job Switching," the episode in which Lucy and Ethel work in a chocolate factory and famously stuff their blouses, hats and mouths with chocolates to keep up with a conveyor belt, "was one of my favorites." The summaries also lead to interesting anecdotes, such as the fact that it took the writers a day and a half to come up with the name "Vitameatavegamin," the product Lucy promotes in Season One's episode "Lucy Does a TV Commercial." For *Lucy* fans, this nugget of insider information is like striking gold.

As readers might expect, Davis' voice is rich with humor, like when she states, "when I was first starting out in television in 1951, you could have held [a meeting of women TV comedy writers and producers] in a booth at McDonald's." Other examples of her humor come in the form of witty chapter titles such as, "Don't You Have a Better Joke than That?," "Who's the Pushy Broad at the End of the Table?," "Don't Step on the Children" and "The Mertzes (Or As Desi Called Them, 'The Merzes')."

Davis was a pioneer in the TV industry, despite the fact that neither she nor Carroll had any idea they were writing a classic. She admits, "The truth is we sat down and tried to come up with an idea for the next show."

Much like the show, Davis' book is enjoyable and light-hearted. Her memoir is a treasure for *I Love Lucy* fans hoping to relive memories and learn about how the show came together from the inside. **SA**

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Los Estudios de USA se preparan para enfrentar la imponente rivalidad de los "Incos"

Esto es lo que sabemos: En cierto momento a inicios de los años '80, la cadena de TV ABC quiso deshacerse de sus afiliados. En 1985, un grupo de sus afiliados compró la cadena. Luego, a fines de los '80, las cadenas de TV americanas hicieron lobby frente a los políticos para que eliminan ciertas regulaciones restrictivas ya que ellos deseaban comprar los Estudios de Hollywood que les proveían de contenido. A mitad de los '90 los Estudios comenzaron a comprar las cadenas de TV.

Hoy en día, los Estudios desean dejar de lado a sus intermediarios (minoristas, exhibidores, MVPDs-distribuidores múltiples-, proveedores digitales, etc.). Si la historia sirve como guía, es muy posible que, al final, los intermediarios sean los que compren los Estudios o que los mismos intermediarios se conviertan en Estudios en sí mismos. De todas maneras, en esta última competencia corporativa, el resultado todavía no está definido.

Esto es lo que entendemos: los Estudios se orientan hacia diferentes iniciativas de difusión digital - por un lado el B2B, para la difusión de contenidos a sus clientes de manera automatizada y sin soporte en tapes (tapeless, el modelo denominado tape-to-file), para de esa manera eliminar el soporte físico. Por otro lado está el B2C, con la intención de eliminar a los intermediarios y de esa manera reemplazar rápidamente los declinantes ingresos por DVDs.

Así es que, los Estudios tienen al mismo tiempo un desafío inmediato y uno a largo tiempo. El primero es reemplazar los ingresos de los DVDs (que solían llegar a los U\$D 20 billones anuales) con las ventas digitales, que, a su vez, permitirán la producción de más películas (con el desplome de los DVD's, los Estudios bajaron la producción de films de 204 en 2006 a 141 en 2010). El problema a largo plazo es no entregar su negocio a las "Incos" (las compañías de Internet).

¿Por qué, al fin y al cabo, los Estudios deben pagar "comisiones" sobre sus productos a los intermediarios en el negocio de la emisión On-line, tales como estaciones de TV y redes de cable; en el área de consumo, tal como en los negocios de venta de videos; en el área teatral, tal como los cines; y en el mundo digital, en tales como Apple, Google, Yahoo,



Los estudios de animación de la India, listos para crecer y consolidarse

Usualmente en MIPCOM, los ejecutivos de la TV internacional están acostumbrados a ver a una pequeña delegación, digamos unos 10 participantes, de compañías de la India con stands. Pero, detrás de esta modesta fachada orbitan unas 60 compañías, la mayoría activas en animación, todas representadas en Cannes. A su vez, otros 300 estudios de animación adicionales de distintos tamaños giran alrededor de estas compañías, dando trabajo de manera acumulada a cerca de 12000 animadores a nivel nacional.

No es un secreto que el negocio de la animación en

India está en alza, irrumpiendo en la escena internacional para desafiar a las dominantes Filipinas, Taiwán, Corea y China, como destinos para producir animación a costos accesibles. En su edición de junio/julio 2011, *VideoAge* informó acerca del incremento

(Continuación a la página 16)

Los problemas financieros con el doblaje

Desde la introducción de la venta internacional de programas de TV, mucho antes de la globalización, el doblaje (dubbing) ha sido crucial para este negocio. Cumplió su función extremadamente bien cuando la venta de programas extranjeros de TV se volvió una parte del negocio global del entretenimiento. Sin embargo, ahora, el doblaje ha pasado de ser un valor activo (ya que permite

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(Continuación a la página 14)

Los Estudios de USA

(Continuación de la página 13)

Microsoft, Amazón, AOL y Netflix?

Pero eso no es todo. Al continuar proveyendo de contenidos a los "Incos", los Estudios están básicamente vendiéndole a los medios digitales, la soga con la que serán colgados. Efectivamente, la ambición de las compañías de Internet de convertirse en compañías de Medios, no es cosa nueva. Comenzó en 1995 cuando la telco MCI invirtió U\$D2 billones en News Corp., siguió en 2001 cuando Yahoo contrató a Terry Semel de la Warner Bros (se alejó del cargo en 2007) y continuó el año pasado cuando Yahoo contrató a Roos Levinsohn, un ex ejecutivo de News Corp.

Sin embargo, el mayor precedente de todos ocurrió cuando en el año 2000, Time Warner (TW) se fusionó con AOL, probablemente anticipando el inevitable amalgamiento entre distribuidores y proveedores de contenido. Tal como fue informado, en aquel momento el CEO de TW Jerry Levin estaba pensando de que manera transformar TW hacia la era digital con su mirada puesta en Yahoo también. La fusión fue fustigada (por VideoAge también) y fracasó por diferentes razones, incluida una mala ejecución, un choque de culturas entre contenidos y ejecutivos de Internet, y la burbuja de la Internet del año 2000. Pero lo más importante es que - estaba sumamente adelantada a su tiempo.

Esto es lo que suponemos: Las compañías digitales son del tamaño de un mamut tanto como los son los estudios. Imaginen, Disney, una compañía valuada en USD80 billones y con ingresos de USD39 billones por año, es comparada en un reporte financiero de Yahoo, con Amazón (valuada en USD80 billones y con ingresos de USD37 billones). Apple (valuada en USD290 billones con ingresos de USD87 billones), Microsoft (valuada en USD168 billones con ingresos de USD68 billones) y Google (valuada en USD139 billones y con ingresos de USD31 billones), todas estas junto con Yahoo, Amazón y Netflix, tranquilamente podrían fácilmente igualar el poder financiero de los seis grandes Estudios americanos. Con USD7 billones en sus reservas, Amazón podría llevar a cabo la compra de uno de los grandes Estudios de USA, especialmente si consideramos la manera en la que las compañías de medios tradicionales, como está diseñado le esquema actual, se han vuelto relativamente pequeñas.

Por el momento la confrontación es mantenida al mínimo ya que ambos mamuts necesitan uno del otro. En efecto, tal como mostraron los resultados del último trimestre de CBS, el estudio recibe aproximadamente unos USD200 millones de Netflix (por USA, Canadá y Latinoamérica) y estará recibiendo unos estimados USD100 millones de Amazón, ambos en los próximos dos años. Según se informó, CBS está negociando acuerdos similares con Microsoft

y Facebook. Sin embargo, ninguno de los contenidos licenciados a los distribuidores digitales se encuentra actualmente en el aire. De la misma manera, NBC Universal vendió a Amazón los derechos de emisión digital On-line de 1000 películas. Recientemente Amazón lanzó "Prime", la suscripción de un servicio de video con cinco millones de suscriptores.

En estos días, todos los grandes "Incos", incluyendo a Google y Yahoo, son compradores de los productos de los Estudios, lo que les garantizará el abastecimiento de contenido al menos en un término medio, pero hay señales de que algunos Estudios se están poniendo reacios a cerrar nuevos contratos de TV paga. Es por ello que "Incos", tales como Apple, quieren estar una vuelta de tuerca por sobre los Estudios, y convertirse en lo que fueron los Estudios, proveedores al consumidor de todas sus necesidades de entretenimiento: música, películas, TV y juegos.

En marzo último, Netflix, con una sólida base de 25 millones de suscriptores, encargó su primera serie original, la versión americana de la serie de suspenso político inglesa House of Cards, por unos estimados USD100 millones. Para no alamar a los Estudios, Netflix anunció que el contenido original será una pequeña porción de la grilla de la compañía.

Mientras tanto, Levinsohn de Yahoo quiere convertir la "Inco" en una compañía de Medios con su propia y totalmente desarrollada red de TV. Yahoo ya tiene canales de deportes y de noticias que son vistos por 18 millones de espectadores. Sin embargo, de acuerdo a un artículo en el Financial Times, Yahoo no invertirá USD100 millones como lo hizo Netflix. En su lugar tiene como objetivo producir hasta un 30% de sus propios contenidos. Actualmente, Yahoo produce mensualmente 200 episodios de 20 series originales.

Los Estudios también son conscientes de que la pobre situación económica está ayudando a las compañías de Internet. Se ha informado que cerca de un 15% de los hogares americanos con TV (TVHH) recibe la TV con antenas aéreas y que otro 15% no está abonado a ningún servicio de TV pago. Además, según un informe escrito el 25 de mayo de 2011 por Craig Moffett, analista en Sanford C. Bernstein & Co., las compañías de telecomunicaciones y de cable de USA tienen un "problema de pobreza". Muchos de los consumidores de bajos ingresos (estimados por lo bajo en un 40% de los TVHH americanos) evitan el servicio de televisión paga ya que no pueden afrontarlo. En cambio, buscan sintonizar alternativas más baratas, transformando el video streaming y otros servicios de ese tipo en alternativas "lo suficientemente buenas" y atractivas.

El plan a corto tiempo de los Estudios fue el desarrollo de UltraViolet (UV), un consorcio de estudios de USA (Disney excluido) basado en un sistema de nube a ser lanzado próximamente por medio de la Venta Electrónica (Electronic Sell Through-EST). Esto es para mantener el modelo de negocio de los ingresos en marcha, ya que los márgenes de ganancia

en EST son mucho mayores a los de la venta de DVDs (que promedia un 65%) dado que no hay costos de manufactura. Al mismo tiempo, UV le permite a los Estudios mantener una especie de "estable inestabilidad" con sus intermediarios.

UltraViolet es un sistema de nube en el cual el contenido no está almacenado en un computadora (o en el sistema de almacenaje del consumidor) si no en el sistema o "nube" del proveedor. Cuando el contenido es almacenado en algún dispositivo del consumidor, se lo llama download (pudiendo ser un alquiler o una venta), pero si el contenido se encuentra en una "nube", este puede ser transmitido desde cualquier dispositivo y, una vez más, puede ser alquilado por cierto período de tiempo o comprado vía EST.

Pero, la historia demuestra que consorcios como UV tienen una estructura corporativa pesada, como lo demuestra la experiencia de Hulu. Con cerca de 27 millones de espectadores por mes, Hulu puede ser considerado un éxito, sin embargo la estructura de sus propietarios (Disney, News Corp. y Comcast/NBC Universal) crea conflictos de interés que han impedido el crecimiento de Hulu.

Lo que también es problemático para los dueños de los Estudios es que ellos mismos han mejorado su propia competencia, si es que Hulu es vendido a uno de los "Incos" tal como fue previsto.

Por lo tanto, con esto en vista, en el futuro próximo, los seis grandes Estudios competirán con igual número de "Incos", que se volverán mucho más grandes que cualquier otra compañía de Medios. ●

su contenido automáticamente, pero se ha vuelto una gran problema para los estudios independientes que no pueden capitalizar todo el material de archivo acumulado.

Obviamente, este problema de doblaje existe principalmente en las regiones donde el español, el francés, el inglés y de manera un poco menor, el portugués son hablados. El hecho que representen amplios territorios amplifica el problema a tal punto que un nuevo modelo de negocio es necesario. VideoAge salió a indagar, entrevistando a distribuidores de programas y a estudios de doblaje, para descubrir los problemas que estos sectores están confrontando, y presentar nuevas alternativas. Todos sabemos que la realización de un doblaje de buena calidad es un emprendimiento extremadamente costoso. Anna Dunn de Cine Dubbing, estudio de doblaje ubicado en Roma, estimó en unos 20.000 a 80.000 Euros (USD28.500-USD113.000) como un rango estándar de precios para un largometraje doblado al italiano y eso es mucho dinero para poner en juego sin ninguna garantía de retorno.

Una solución frecuente, dijo Deeny Kaplan, de "The Kitchen", con bases en Miami, Los Ángeles y Caracas, es que los distribuidores reciban el demo de un segmento de su producto, y de esa manera tener una muestra para exhibir a los ejecutivos de compra. "En las grandes ferias, como MIPCOM y MIP-TV, las compañías vienen a vernos y nos piden un demo (doblado) de unos 10 minutos o de un episodio, si es una serie en varios idiomas, así lo pueden mostrar a los compradores". Para el último MIP-TV, The Kitchen produjo 67 demos. Kaplan dijo, "Raramente un distribuidor independiente, hará una serie completa. Eso sería probablemente una locura". Roberto Mendoza, que además de asesor en traducciones también trabaja como locutor de doblaje, dice que es llamado continuamente para realizar demos. Las compañías le pagan por realizar en el momento traducciones simultáneas de segmentos con sus contenidos, con la condición de que si el producto es vendido, será contratado para el proyecto completo. Este tipo de demo de doblaje es mucho más barato que realizar el casting y el mezclado de una banda completa. "Pero hacerlo de esta manera tiene su contrapartida. Explicó Mendoza, "se recibe una sola voz para todos los personajes, la dicción, el sincronismo y la actuación pueden no ser tan buenos".

Para las distribuidoras, el doblaje tiene muchos beneficios. Lisette Osorio, de Caracol de Colombia, con base en Miami, dijo que su compañía comenzó a usar el doblaje para la programación de África, y subsecuentemente, todo ese territorio se les abrió. Poder ser capaz de proveer un producto terminado con doblaje, es una buena solución, dijo ella, agregando que ello ha contribuido a que Caracol gane exposición en la región e incremente la demanda. Osorio aceptó que hacer el doblaje es un emprendimiento costoso, pero que no hay un modelo alternativo de negocio. Debes verlo como una inversión, ella dijo. Puedes tener el retorno de tu dinero, o más, pero debes distribuirlo a muchos canales.

En lo que respecta al tema de los derechos, la situación es complicada, dijo Anna Dunn de Cine Dubbing. Cada país

Doblaje

(Continuación de la página 13)

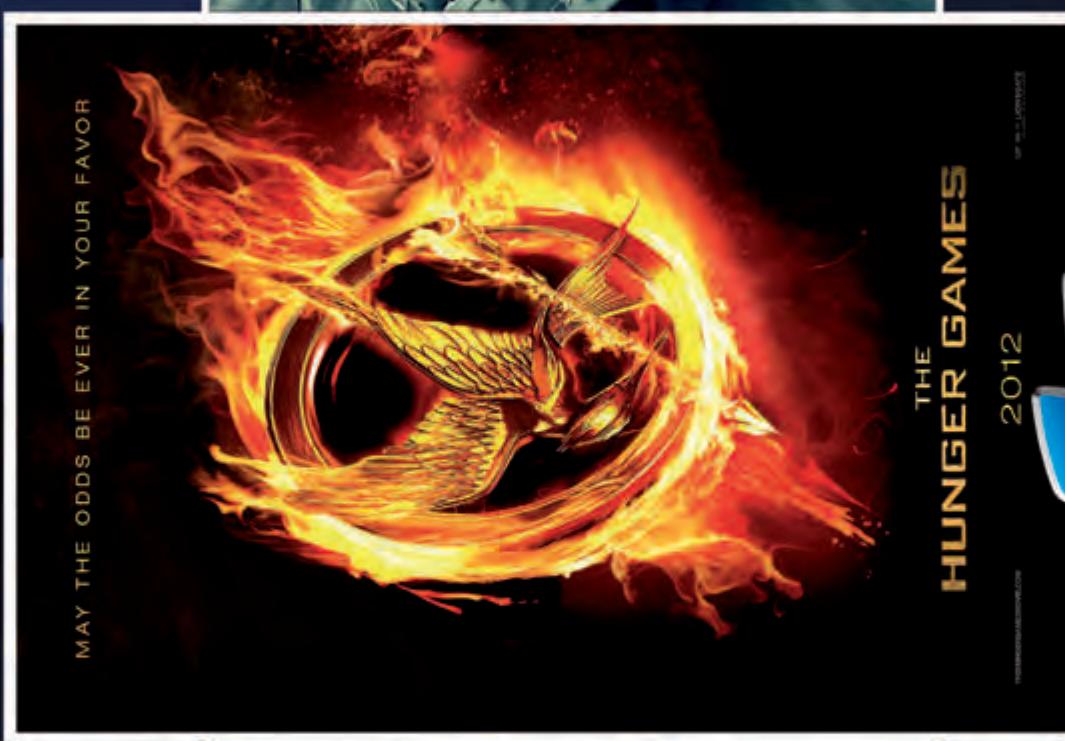
las ventas internacionales) a ser una carga. Especialmente para las compañías independientes. Así es, que miles de horas de buena programación duerme en los depósitos debido a problemas financieros con el doblaje.

El problema es que los costos del doblaje como los costos de producción se han incrementado, mientras que los valores a pagar por las licencias de los programas, en muchos casos, han decrecido. Bajo estas circunstancias, pequeñas y medianas empresas independientes, sólo pueden afrontar el doblaje si un programa es prevendido. Pero en un verdadero Catch 22, el programa generalmente no puede ser vendido si no ha sido previamente doblado. Además, muchas veces, los compradores potenciales piden comprobar la calidad del doblaje antes de comprometerse a la compra. Esta situación de huevo/gallina no afecta a los grandes estudios americanos ya que ellos por sí mismos doblan todo

(Continuación a la página 16)
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Los estudios de animación

(Continuación de la página 13)

de inversión canalizado a la animación en India que actualmente genera unos estimados USD700 millones de dólares al año y se espera llegue a los mil millones para el 2013.

Como secuela al primer informe de *VideoAge*, nos introdujimos en seis de los más importantes estudios, de las 19 compañías principales de animación, con la ayuda de *AnimationXpress*, una publicación on-line que hace foco en los aspectos comerciales de la animación en India. El CEO Anand Gurani tenía mucho para decir acerca del meteórico crecimiento de la industria de la animación India. Actualmente, dijo, la animación india está en una etapa de consolidación y de manera silenciosa, en una sólida evolución en la que los más desarrollados comienzan a separarse de los más pequeños. Elaboró lo siguiente, Los modelos de negocio son revisados, las compañías más fuertes están creciendo más fuerte todavía y de manera más global, mientras que la innovación y la especialización emergen como factores centrales en los pequeños emprendimientos para sostenerse y sobrevivir.

Gurani nombró como a líderes a los estudios de animación: DQ Entertainment, Prime Focus, Crest Animation, Prana, Tata Elxsi, Big Animation, Rhythm & Hues, Technicolor, Dreamworks Dedicated Unit, MPC, Accel, Greengold, Krayon Pictures, Toonz Animation India, Reliance Mediaworks, Pixion, Animagic India, Eksauraus y a Indian Artists.

Ubicada en Kerala, Toonz Animation es vista por algunos como el mejor estudio de animación del país. Fue establecido en 1991 por un hombre de negocios ubicado allí, el americano G. A. Menon, y es apoyado por el multimillonario grupo Comcraft Group, ubicado en Ginebra. Si bien los inicios de la industria de la animación fueron impulsados por los proyectos provenientes de los países del Oeste, la llave del secreto de Toonz puede que se encuentre mucho más allá que en el modelo de la tercerización. Dos años después de su fundación, los altos mandos de Toonz comenzaron a alejarse del modelo de la animación encomendada hacia la coproducción. Tal como lo expresa el CEO de Toonz, P. Jayakumar, Nos dimos cuenta que el verdadero negocio no estaba en la tercerización sino en la coproducción y ser los dueños de tu propio IP. El resultado de esto fue la realización de *Tenali Raman* (2002), que fue la primera serie de TV animada de India, y de *Hanuman* (2007), el primer largometraje animado de la India.

Jayakumar dijo, Ahora somos uno de los grandes jugadores en la arena internacional de la animación y tenemos puestos nuestros objetivos en convertirnos en la terminal de producción final de films



Anand Gurani de AnimationXpress

de todo el mundo. En los 12 años desde que Toonz abrió sus puertas, el staff de animadores creció de 65 a 400. Figuran entre sus clientes internacionales Rainbow de Italia, Marvel Studios de USA, la BBC, Cartoon Network Asia y muchos más. Además, como tantos otros estudios de animación de la India en crecimiento, Toonz ha abierto también oficinas en Los Ángeles. Pero probablemente para Jayakumar y su equipo los proyectos locales sean los más importantes. Toonz aspira a hacer por año al menos tres films para el mercado doméstico y tres para el mercado internacional, asegurando que el creciente mercado local no sea relegado.

El crecimiento de Toonz se vio ampliamente facilitado por la mano de obra barata. Jayakumar marcó que, Los animadores en USA cuestan cerca de USD125 la hora, mientras en la India cuestan USD25 la hora. Con bajos costos de producción y una gran base de mano de obra calificada, muchas compañías de la India son las responsables de generar contenidos creativos de alta calidad. Hay muchas compañías de animación que han entrado ahora en este rubro.

Una compañía que Jayakumar señaló como una de sus mayores competidoras es Crest Communications. Como tantos otros estudios de alta gama, las oficinas centrales de Crest se encuentran en Mumbai. En el 2010, el centro de producción de Crest entregó 250 episodios de 30 minutos para televisión y 12 DVDs, incluyendo grandes títulos tales como *Little Engine That Could*, *Casper*, *Arthur* y muchos más. El personal de animación CGI cuenta con 500 personas, y como Toonz, Crest se ha expandido a Burbank para posicionarse mejor en Hollywood. Crest es conocido principalmente por ser pionera en efectos especiales.

Otro contendiente de alto rango es Tata Elxsi, ubicado en Mumbai (ver la edición de junio/julio de *VideoAge* para tener un perfil más profundo). Tata Elxsi también abrió una oficina en Santa Mónica, y se asoció con A Squared Entertainment en series de alto perfil como *The Governor* con la participación de Arnold Schwarzenegger, hasta que el proyecto fue cancelado por los recientes escándalos personales que afectaron a Schwarzenegger. Además de la corta coproducción con A Squared, el CEO Subramaniam Ramadorai, destacó

colaboraciones con Disney y con YFR Productions.

Tal como la Toonz de Gurani, la compañía Tata de Ramadorai está lentamente abriendose a la producción original. Pero la forma de abordarla de Ramadorai es conservadora. Creemos que es importante para nosotros focalizarnos de manera correcta para pasar de la tercerización a la coproducción o a la producción. Dijo.

El éxito de Tata ha sido también el resultado del énfasis puesto en capacitación y control de calidad. Ramadorai envía al staff creativo a UCLA para mantener sus habilidades a la altura de los estándares globales. Dijo Ramadorai, Mientras que el costo es un factor significativamente atractivo a la hora de considerar la tercerización del trabajo de animación, debemos garantizar aspectos centrales para estar de manera consistente al nivel de altura de calidad esperado en el mercado internacional.

También ubicada en Mumbai se encuentra DQ Entertainment. Fundada por su Presidente y CEO Tapaas Chakravarti, DQ produce gran cantidad de material para una lista de grandes nombres internacionales en Europa, Norte América y Asia, incluyendo a Nickelodeon, The Disney Group, TF1, RAI, ZDF Germany, NBC Universal, Sony Pictures Entertainment y muchos más. DQ también presenta un impresionante resumé, con cantidad de premios en su haber incluyendo los honores recibidos en el Daytime Emmy, los premios Pulcinella de animación en Italia y otros más.

DQ destaca su posición a la vanguardia del frente tecnológico. El productor y Presidente Chakravarti anunció que su compañía tiene varios films en 3D estereoscópico en trabajo. Los proyectos incluyen *The Jungle Book*, que espera ser estrenado en 2012 o 2013, *The Adventures of Peter Pan* previsto para 2013 y *The Phoenix* y *The Flying Carpet*, que llegarán a los cines en el 2014.

Sin embargo no todos los grandes éxitos vienen de Mumbai. Technicolor India está ubicada en Bangalore, y posee 1000 animadores que han trabajado en grandes éxitos como *Kung Fu Panda* y *Penguins of Madagascar*. Biren Ghose de Technicolor nos comenta que todavía hay mucho espacio para que su compañía crezca: Solo hemos arañado la superficie cuando se habla de ventas y desarrollo del negocio.

Además está Accel Animation Studios en Chennai, que se encuentra presente sólo desde el 2006, pero que ya se ha expandido como la segunda productora en Thiruvananthapuram. Su Presidente N.R. Panicker lidera un team de 250 animadores que se especializan en animación 3 D.

Acerca del futuro de esta industria, parece ser que hay un gran horizonte para crecer. Gurani de *AnimationXpress* predice, El futuro indica que habrá muchos más jugadores internacionales abriendo sus facilidades en la India y varias compañías de India saliendo e involucrándose a nivel internacional. El mundo está viniendo a la India de la misma manera que la India está abarcando al mundo.

Doblaje

(Continuación de la página 14)

tiene diferentes leyes, dijo. Por ejemplo en Italia, se aplica dos tipos de regulación diferente acerca de la propiedad de la banda doblada. Uno es que la compañía que ha encargado el doblaje automáticamente obtiene la propiedad de la banda que fue abonada en su totalidad al estudio de doblaje. Pero hasta que el pago es realizado para cada doblaje, dijo Dunn, los derechos le pertenecen al estudio de doblaje. Si el pago se encuentra atrasado cuando el programa sale al aire, el estudio de doblaje tiene el derecho de ordenar al broadcaster de detener la emisión del programa.

A la inversa, en The Kitchen, en USA y Venezuela, Kaplan negocia un precio fijo de antemano que incluye los derechos. Cuando presento un presupuesto a un cliente, ellos poseen la totalidad de los derechos, dijo. Le pagamos a nuestro talento y el trabajo es realizado. Esta diversidad de aproximaciones e interpretaciones sobre los derechos de propiedad pueden causar disputas ya que, hasta ahora, la industria no ha conseguido crear un marco de trabajo que le sea común a todos.

En el frente económico, las ventas de TV podrían incrementarse para las compañías independientes si el material que tienen en su inventario pudiera ser doblado. Actualmente una gran porción de material potencial está en las estanterías. Es claro que para poder capitalizar los valores que están durmiendo, los sectores de doblaje y distribución tienen que traer un nuevo modelo de negocios en el que los dos sectores compartan costos y ganancias. El advenimiento a nivel mundial del broadcast digital requerirá enormes cantidades de contenido doblado. Solo en Latinoamérica, fue estimado por el *VideoAge Daily* en NAPTE 2011, cerca de 600 estaciones digitales van a requerir unas 7000 horas de programación diaria, lo que sumado lleva a casi 2.5 millones de horas anuales de contenido. Esto se debe comparar con las 700.000 horas anuales de programación en estaciones terrestres.

Puede que la respuesta no esté en un camino de dos carriles, sino en un modelo de negocio de tres carriles, en donde el broadcaster digital también participa compartiendo costos y ganancias.

Otra idea de modelo de negocios provino de Miami, de NewsProNet de John Cuddihy con base en Florida, quien recomienda a los distribuidores dar a los estudios de doblaje los derechos para un territorio (tales como Venezuela o Colombia) a cambio de los costos de doblaje.

Finalmente, Ken DuBow, presidente de Opus, distribuidor internacional de films con base en Tarzana, California, permite a sus distribuidores pagar (o llegar a un arreglo) por el doblaje, acordando que, al final, Opus recibe los derechos del doblaje.



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ATF, MIP-TV Marriage Gives Birth To France TV

The French have decided to reconquer Southeast Asia, after losing it to the Americans in the 1950s. To do so, the French began with a show of strength at the Asia TV Forum and Market (ATF). They boasted an unusually large presence and threw a huge bash, calling in the heavy artillery from Paris in the form of French actress Carole Bouquet, accompanied by Unifrance's president and top producer Antoine de Clermont-Tonnerre.

Coincidentally, Paris-based Reed MIDEM, which organizes both MIP-TV and MIPCOM in Cannes, announced a series of co-ventures with the Singapore-based ATF.

Even though the same parent company owns Reed MIDEM and ATF, they operate independently. A few years ago, the former tried to re-start its early version of an Asian TV market in Hong Kong that was in clear competition with ATF and was subsequently closed. After a great reception from international distribution companies and buyers alike, the MIP project was scrapped, reportedly due to pressures from the Singaporean government, which runs a large sovereign fund with investments that touch many industries, including media and exhibitions.

While Asia continued to be in Reed MIDEM's plans, ATF started to suffer a small decline, with some companies sending junior executives and others abandoning it altogether.

The ATF-MIP cooperation agreement announced at last month's ATF could represent a win-win compromise for both companies. It calls for MIP to help



A+E's Catherine Ruffini, Kerri Tarmey

ATF set up a co-production initiative and revitalize ATF seminars. As Reed MIDEM's Anne de Kerckhove explained during a press conference, her company is prepared to "invest massively at ATF."

In addition, the ATF called in the Singaporean government's very powerful Media Development Authority (MDA), which controls the city-state's audiovisual industry and, through various investments and incentives, influences production and distribution in many countries. The Authority, always a towering presence at ATF, arranged for 60 small local producers to attend ATF for free.

Another welcome addition was the change in exhibition location, from the cold and impersonal Suntec complex of past years to the cozier and better-suited Marina Sands Expo.

These moves, together with a good number of first-time exhibitors such as Opus Distribution, Goldstein-Douglas and Kanal D, generated what Star Media Russia's Bill Peck described as a "huge traffic flow." Similarly, Opus' Ken



Televisa's Mario Castro, Hugo Trevino

Dubow reported that the traffic was very good and that he had "many walk-ins."

As an ATF veteran explained, Asian TV buyers tend not to answer meeting requests, preferring instead to make on-the-spot appointments on a walk-in basis.

Beatrice Grossmann of Swiss TV, RSI, noticed that many participants listed as buyers were in effect sellers who also acquired product for their distribution pipes. With regard to this, Televisa's Mario Castro commented, "even though we talk and meet with everybody, we avoid doing business with agents and distributors, preferring instead to go direct." At ATF, Televisa's executives met with free TV and pay-TV buyers, as well as producers looking for formats and co-productions.

While China boasted a large selling presence, on the buying side, representatives at the ATF were understandably scarce considering the recent large-scale restrictions on genres (especially reality and game shows) and imported programming that the Chinese government has imposed, in addition to limiting TV advertising.



French actress Carole Bouquet, RSI's Beatrice Grossmann at Unifrance's opening night bash

Despite the vibrant energy of ATF's opening day, the market traffic slowed down considerably on day two, making the event in effect a one-and-a-half day TV trade show out of the three market days.

The opening night bash on December 8 was sponsored by Unifrance, France's film marketing organization — an unusual event at a TV trade show — that marked the organization's first-time participation in the ATF. Labeled the "First Rendezvous With French Cinema In The Presence of a Delegation of French Cinema Celebrities," the event consisted of a champagne cocktail reception, the screening of *The Artist* (a recently produced black and white silent film) and a full-fledged buffet party.

The following day, the large French delegation — consisting of celebrities, executives from film companies under Unifrance and from TV production and distribution companies under TV France International's (TVFI) umbrella — met at the French Embassy in Singapore, supposedly to map out a winning promotion and market strategy for Southeast Asia.

Symbolism in France is a serious matter, and, at the ATF opening party, TVFI took a secondary role, as if Unifrance were saying that the "big guys" are now taking over. The fact that the movie screened was not a mainstream product could symbolize that France is reclaiming its dominance on its own terms.

Finally, the grandiose ATF opening event that spared no expense clearly indicated that France's audiovisual industry is fully committed to regaining Asian territories. What remains to be seen is the level of follow-through and results. ●



ATF and MIP executives announcing they're joining forces



Some of Spain Audiovisual's representatives from l. to. r.: Edebe's Ivan Agenjo, Film Factory's Vicente Canales, FAPAE's Maria Jose Vadillo, Imagina's Barbora Susterova

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Mexico's TV

(Continued from Cover)

TV Azteca. This is compared to, for example, just nine percent taken by radio and eight percent by newspapers.

And Mexico's advertising market is a sizeable one. In their Entertainment and Media Outlook 2011 to 2015, PricewaterhouseCoopers (PwC) gives a provisional figure for total Mexican television advertising in 2010 of U.S.\$2.8 billion (up from \$2.56 billion in 2009) and predicts that this number will rise annually to hit just under U.S.\$4.1 billion by the end of 2015, representing a Compound Annual Growth Rate (CAGR) of 7.7 percent.

Media analyst Screen Digest, meanwhile, put the number of cable homes at the end of 2010 at 5.8 million, and predicted that this will grow to 7.2 million by the end of 2015. Plus, they estimate that satellite subscribers numbered 4.4 million households at the end of 2010, predicting that this number will rise to 11.7 million by the end of 2015.

The figures for revenue generated by Internet access are even more impressive. PwC's provisional figure for 2010 is U.S.\$2.7 billion (up from \$2.2 in 2009) and this is predicted to have more than doubled by 2015, hitting U.S.\$5.7 billion at an eye-popping CAGR of 16.1 percent. In these strained economic times, many would think these figures make Mexico a market worth fighting over — and they'd be right.

The three richest and most powerful media barons in Mexico — the world's richest man, Carlos Slim; Televisa owner Emilio Azcarraga Jean and Ricardo Salinas Pliego, owner of TV Azteca — are engaged in a battle to become not merely Mexico's triple-play operators (TV, Internet and voice), but Mexico's quadplay monopoly holder, which includes mobile telephony.

At the start of the year, Slim was missing the broadcast license, and still is, although his main company, Telmex, does handle marketing and billing for satellite operator Dish Mexico. Azcarraga was missing a mobile operator, and Salinas, who owns a mobile operator, Iusacell, was struggling to get the company's share of the mobile market — 70 percent of



Carlos Slim

which is controlled by Slim's Telmex — to reach a five percent market share, and to deal with debt of just over U.S.\$1.5 billion. Iusacell was also involved in a protracted legal wrangle with another Mexican mobile operator, Nextel, over last year's government spectrum auction; however, the two companies agreed to drop this case last month.

Iusacell also took action against Televisa on the same issue, but dropped it earlier last year when it agreed to sell a 50 percent stake of the company to Televisa for a reported U.S.\$1.6 billion. Of that amount, U.S.\$1.57 billion will be used to clear Iusacell's convertible debt.

The advantages of this deal for Iusacell are clear, and for Televisa the deal offers the Holy Grail of quadplay operator. (Megacable, which controls about half of the Mexican cable market, announced in October that it would offer quadplay by teaming up with the Mexican subsidiary of Spain's Telefonica, but the service will be a Mobile Virtual Network Operator, which means that it will offer mobile services to its customers, but will not own any infrastructure, such as frequency licenses or transmitters). So, superficially, it looks like a good deal all around, but not everyone thinks so. Televisa's shares fell 9.7 percent on the announcement of the deal, and corporate finance house UBS commented, "the key notion behind Televisa's intent to be a telecom player, and especially one in the mobile business, is defensive." It went on, "we see the point, but fail to understand why equity, as opposed to commercial agreements, is a must."

Meanwhile, Slim, a man used to getting his own way, has started streaming content, including news, sports and cultural programming, prompting TV Azteca to sue his carriers America Movil and Telefonos de Mexico. Matters were brought to a head by the recent streaming of the Pan American Games, of which Telmex was both a sponsor and owner of the Mexican online rights, while TV Azteca owned a portion of the Mexican broadcast rights.

Looking at these developments, all



Ricardo Salinas Pliego

of which have occurred in the past 12 months, it would be easy to think that Mexico is now a dynamic market about to enter a period of significant change, but Eddy Ruiz, EVP and general manager of Miami, Florida-based A+E Ole Networks thinks otherwise. "Television in Mexico," he asserted, "is dominated by Televisa and TV Azteca, and I don't see that changing much — not in our lifetime anyway!"

Explaining his reasoning, Ruiz continued, "Mexico is a broadcast intensive market, and, although cable has been growing considerably in recent years, these two companies are by far and away the dominant force." Even so, there are tangible signs of change in the market, brought about by the growth of cabsat. In just a few years since it entered the market, Dish has grown to around 2.7 million subscribers at the end of 2011 according to Screen Digest, which predicts that number will grow to 4.9 million by the end of 2015. And, as Ruiz points out, cabsat channels such as A+E's are now producing local content.

While Ruiz insists that these locally produced series demonstrate the growth of cabsat, and "set us apart and give subscribers a sense of getting value for their money," he is just as adamant that, "I don't see any major changes happening in the immediate future." He added, "even five or six years down the road, I see the Mexican market as being just like now, only more so." ●



Emilio Azcarraga Jean

It's a Jungle Out There

(Continued from Cover)

the major distribution systems (such as broadcasters) there is really no alternative.

According to New York City-based Entertainment Studios' Tom Devlin, who's considered a king of the jungle, stations bet on familiarity: "Fresh and innovative product scares them," he said.

On top of this, there is the inequitable competition from larger outfits. A Las Vegas-based program distributor complained that, in Latin America a producer from the U.K. and one from Canada sell children's animation for just a few dollars because their main revenue comes from merchandising.

One thing is clear: Indies will have to spend more money and man hours than the studios do to make any sale. And, the jungle out there only allows for the survival of the smartest. This is because the television programming sales business is now very complicated.

Without considering variation and sub-variation (e.g., subscription VoD and a la carte VoD) of various distribution outlets' licensing, there are at least 15 main ways to sell content rights with opportunities to repurpose existing content. But, even though there seems to be a good number of ways to exploit rights, program producers and syndicators still have to find new ways of generating revenue, keeping in mind that small indies often cannot reach big buyers and there are only three ways to make money with content: through advertising, licensing and direct sales.

For example, for Montreal, Canada-based XII Tribes Entertainment's Michel Zgarka, "viral revenues (i.e. YouTube) represented major revenues for *Gummibar & Friends*. With close to two billion hits and having been able to monetize the hit, it was for us a key element in the financial structure of the TV special and series."

Indeed, if revenue from major TV outlets can be called "macro," "micro," is a myriad of little payments that producers and distributors can extract from the online universe. This is a good way to monetize content that is difficult to sell to TV outlets (e.g., comedies) or that are outside the popular cycle (e.g., primetime soaps). Older archives are also perfect candidates for micro-payments. Researchers in the U.K. have found that, for such content services, consumers are willing to spend anything from 10 cents to \$3.25. Micro-payments for digital content are estimated to have reached worldwide \$12 billion.

Los Angeles-based Opus Distribution's Ken DuBow has found a good strategy in shared windows, though it's not a new concept. This adds revenue when a



Bumping into each other?

(Continued on Page 26)
JANUARY 2012



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It's a Jungle Out There

(Continued from Page 24)

station that acquired a few plays over several years allows the distributor to sell the same movies outside those plays to other outlets.

What can be considered a new development — and it is not barter or product placement — is sponsorship, or selling to advertisers. As explained by Toronto, Canada-based TLN's Aldo Di Felice, this latest development is used especially by German car manufacturer BMW, Nike and Gillette as ad-funded



A+E's Steve Ronson, Kate Winn

programming that is given to broadcasters for free (though Red Bull tries to sell such programming). Nike, for example, tends to fund documentaries that, at times, do not even show their brands.

An example of ad-funded content business direct to consumer is New York City-based Screen Media's Popcornflix.com, with 350 movies available for free

and supported by advertising.

Another aspect of the business that's not to be underestimated is DVD. It still brings big numbers for a "dead business." In 2011 the DVD business in the U.S. reached \$18 billion. Even though some erosion is expected to start this year, it will nevertheless remain a robust market, in the view of Steve Ronson, EVP at New York City-based A+E Enterprises. The erosion is caused by the fact that single TV episodes and movies go digital rapidly; therefore, the U.S. studios are slowly reducing dependence on the packaging business, causing a drop in volume.

"I see a great opportunity in the DVD business, especially if big studios are curbing their involvement," said Ronson. A+E Networks Home Entertainment puts out some 200 new titles a year on DVD with quantity



ranging from 5,000 to 250,000. "The break-even point is rather low," said Ronson, "about 2,500 units."

A+E Networks (recently rebranded from AETN) has a library of 10,000 titles on DVD, and in 2011 put out 15 million DVDs. A+E Networks' DVD sales are done directly through its own Web Store (which represents 25 percent of total sales), wholesale stores like Wal-Mart and "Incos" (Internet companies) like iTunes, Amazon, etc.

Asked whether piracy is more problematic for DVD or digital, Ronson answered, "if fairly priced, piracy is not a big problem for either one."

Among the newest revenue-producing streams are the Web Channel outlets of the type pioneered by Google's YouTube. The Inco has come out with 100 Web Channels with a total of 25 hours of daily original programming. The channels comprise 19 categories, including pet and animal (by FremantleMedia), fitness (by Lionsgate), wrestling (by WWE) and satire (by *The Onion* publications). YouTube gives content providers 55 percent of the ad revenues, after recouping the money advanced to producers. Content remains exclusive to YouTube for 18 months. So far, YouTube has advanced a total of \$100 million to content providers. Each channel gets from \$3 million to \$5 million advances.

Among the many ways of splitting content syndication "hair," there is the so-called "interstitials," where short programs (the type favored by mobile operators) are inserted between longer programs. A typical example of such a service is what Miami, Florida-based NewsProNet offers. The company produces two to three minute short-form programs to be inserted into TV stations' news programs and one to two-minute clips for online TV channels.

Finally, in some instances, a content owner can monetize the program soundtracks by placing them in platforms such as iTunes or Amazon, which happens to be a good business model for companies like the London-based Entertain Me Group, a production company that recently launched a distribution division for its music and documentary programs.

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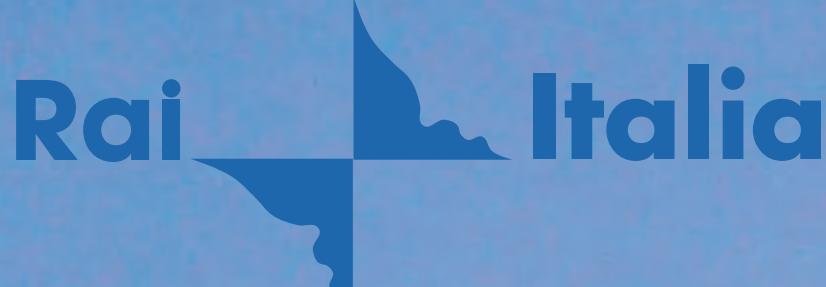
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U.S. Studios

(Continued from Cover)

NATPE is already successful with Latin American buyers, but, apparently, it is not yet enough of a draw for the big studios. Yes, all the studios have large presences at NATPE, which have increased every year since the market moved from Las Vegas to Miami Beach in 2011, but the support is, so far, limited to their Latin American divisions. Indeed, some of the studios have rented full floors at one of the four towers of the Fontainebleau Hotel and Resort and are giving elaborate evening parties, but it's still a far cry from a full-fledged commitment.

Aside from Sony Pictures Television (SPT), which will increase its presence on the boats anchored at the docks of the Marina facing the resort, each studio will reside in extended suites in various towers, with Disney at the Tresor, Fox at the Sorrento, CBS at the Chateau, and Warner Bros. and NBC Universal both at the Versailles.

The opinion of one former Sony exec is that, perhaps, the studios don't want NATPE to become too big for fear of returning to the old days of costly booths, versus the current inexpensive hotel suites. "Besides," the source said, "they don't have that kind of money anymore. Corporate took it away and it is not giving it back."

To a former president of Warner Bros., it's just a matter of budget. "It's where one can make the cuts," he said. He also explained, "Latin America represents about 10 percent of world sales, while the remaining 90 percent comes from 10 percent of the territories."

To a Fox representative, the studio is "not very active [at NATPE]" even though its Latin division is having a pre-market screening to launch its new Keifer Sutherland show, *Touch*, and the home office is even flying its Canadian sales staff to Miami — one of the few



Miami Beach's Fontainebleau Hotel and Resort

studios to do so.

A former NBC Universal executive remembered that "there were always meetings with our president *du jour* to figure out how to split the presence at NATPE and MIP. There were issues with both markets. For example, NATPE was considered too short to have sales executives fly over just for it, so we'd have company meetings before the market." He then continued: "Even though there is always new product to sell, NATPE was considered more of a goodwill gesture than a commercial undertaking."

For an executive who has worked at three of the six studios, "NATPE is not a solid income-producing convention: Its growth is driven by the economic environment and the studios are trying to figure out how to get more for less." He also added that when the February market in Monte Carlo was alive, it was "the best business market of all three." However, he acknowledged that "The timing of NATPE is good," although it is still "a luxury," because buyers commit upfront for the new shows. Therefore the market "is not conducive to major business."

Later, the conversation shifted to the changing business environment, which, for the studios, started with the 2008 writers' strike, when the vertically integrated conglomerates were forced to rely on reality TV. In a vertically integrated business model, one exec explained, failure affects four divisions: Development, Network, International Sales and Domestic Syndication. "And failure constitutes 80 percent of the

business," he concluded.

Nonetheless, with a U.S. presidential election and the Olympics coming up, this year is expected to be good for the U.S. TV networks and, indirectly, for the other studio divisions.

On the U.S. domestic side, more than the changing business environment, what affected NATPE most were the changing rules about vertical integration, which, with the development of a few station groups, eliminated the need to clear a first run show market-by-market.

Before the changing rules, the studios' international divisions — which up to then were housed at the booths of their domestic counterparts — took over, and the domestic arms became their guests. Later, some of the studios' domestic TV divisions tried to explore the potential of the Consumer Electronics' trade show (CES) held in Las Vegas prior to NATPE, but they quickly retreated. Today, what's left of that experiment is a conference organized by CES with the Producers Guild of America, to be held June 8-10 on the Sony Pictures Studio lot in Culver City, California. At the January CES show, the majority of executives hail from the digital divisions of networks such as Canal Plus and HBO.

At CBS Studios International, the general attitude toward NATPE is that the studio "will go where buyers go." But that masks a "chicken and egg" dilemma, because buyers are attracted mostly by the studios' presence, but the latter will not send their sales executives from, let's say, their European offices, to NATPE if

buyers from Europe will not be in Miami.

The executive who served at three studios explained that the studios' attitude toward NATPE offers an "interesting dichotomy," since on one hand they'd like it to grow and on the other they don't want to fully commit.

To a former international president of both Paramount TV and MGM-TV, NATPE is still evolving and Miami is helping. However, even though it is a "big Latin market," NATPE is perceived more as a "conference rather than a sales convention." Indeed, the NATPE organization tends to avoid using the word "sales" in their slogan, which is simply, "Content First."

The former president also said that, in the case of Canada, if buyers want to talk with studio executives from the home office in Los Angeles other than Canadian-based representatives, they can travel directly to California instead of Miami for NATPE. And that explains the reluctance of studios to fly their Canadian executives to Miami. Naturally, if NATPE were able to attract a good number of buyers, studio headquarters would be forced to fly over their regional sales staff. However, he added, as NATPE stands, the large Latin contingent is served by the studios' Miami-based Latin American divisions, while executives from the home office in Los Angeles meet with the few European buyers that attend the market.

On the U.S. domestic side, support for NATPE is a matter of attitude more than a necessity, though this year, with four new talk shows on the roster for fall 2012, marketing (i.e., creating the buzz) is unusually important. With the vacuum created by Oprah Winfrey's departure from daytime television, and Regis Philbin's recent exit from daytime, the U.S. syndication market is ready for a major overhaul this year. The four aforementioned talk shows are not including Debmar-Mercury's Jeremy Kyle talk show and SPT's 2013-slated Queen Latifah daytime show.

Nevertheless, commented a Disney domestic television executive, "We're so well sold with [a new talk show from] Katie [Couric], there simply isn't much of a need [for a NATPE presence] at this point." ■



120x60

LA *Mujer* DE JUDAS



DE ESTA LEYENDA NACERÁ UN GRAN AMOR

NATPE Spirits

(Continued from Cover)

much more efficient...My expectations are that it's much better organized than last year," Vinay stated.

Telefe International's Michelle Wasserman also hoped the market would improve this year, although she was skeptical. "It might be worse this year, but I hope the organization will take care of [the elevator issues]," she said.

Liongate's Peter Iacono stepped up, recommending NATPE "focus on making the market more meaningful and more robust through their panels." Iacono mitigated his comments by adding that NATPE has done a great job with the panels and speakers they've brought to the market in recent years.

Similarly, Argentina-based Ledafilms' Pedro Leda suggested that "For the full duration of the market the hotel only have NATPE attendees as registered guests [at the Tresor Tower]. This would help speed up the use of the elevators." While this may be difficult to implement, it would undoubtedly alleviate some of the strain on the elevators, which caused many buyers to delay or even miss scheduled appointments with distributors last year. Leda also hoped that buyers would be "careful when scheduling meetings, taking into consideration the location of each seller company [to] avoid unnecessarily long walks from one end to the other of the hotel."

Despite some attendees' worries regarding the infamous elevator situation, NATPE president Rick Feldman was optimistic. During a recent press conference he revealed that, "We're looking to have our strongest year, coming off of a strong year in Miami. Everything is pacing really nicely" in terms of attendance figures, he said. Feldman estimated that more than 250 exhibiting companies would



CABLEREADY's Gary Lico exhibiting on the floor at NATPE



NewsProNet's Deanna Ray and John Cuddihy picking up VideoAge Daily at the Tresor Tower

set up shop at the Fontainebleau. But he cautioned, traditionally "NATPE is one of the markets that tend to break relatively late," since some companies book in January.

According to Feldman, "We already have new companies from 15 countries. Probably at least 50 companies that will be in Miami in January...weren't there last year," and there will be three meeting rooms to accommodate the large number of participants. Plus, Feldman stated, "All the major studios are coming in a bigger and better way than they've come at any time in recent memory." (See related front cover story.) He also reported that this year represents the "best contingent of domestic broadcasters that we've had in years."

To remedy the past elevator problems, this time the U.S. studios are spread out in exhibition suites in all four towers at the Fontainebleau, and many of the other companies are housed in additional areas of the hotel, thereby thinning the lines at each elevator bank.

Over 600 buyers from over 65 countries are scheduled to attend, and distributors are looking forward to presenting their content. For Lionsgate, NATPE is important because, as Iacono noted, "it's both an international and domestic market." He went on to say, "We have very robust expectations for NATPE [because it's] a great opportunity to see all of our clients from Latin America, and also some of our European clients will be coming."

While in Miami, Telefe focuses "basically on Latin America, but we do have some meetings with European clients. Latin America for us in its whole is important," said Wasserman.

In the weeks leading up to the market, Leda at Ledafilms said, "As always, NATPE is the kick off of the new year. We will be very busy as [in December], we had already an almost full schedule with over 50 confirmed meetings." The company's core business is Latin American distribution, which

makes NATPE and the L.A. Screenings Ledafilms' major markets.

Tomas Darcyl, president of Argentina-based Telefilms, also emphasized that Latin America is at the core of its business: "Our company, as it did during the last 50 years, will focus on each and every one of the Latin American territories." Power's Waddell concurred that "NATPE is all about Latin America, and it is these buyers that we will focus our efforts on."

The market is not lacking in special events, and Starz in particular will be very active at NATPE this year. As Gene George, EVP, Worldwide Distribution at Starz, stated, this year is "ultra special because there will be lots of events focusing on Starz and *Magic City*." He continued, "We're highlighting and premiering our new original series *Magic City*, which will be launching in April." The series is formally launching at the Miami market with a screening on Sunday, the day before NATPE's official start, at the Fontainebleau. Following the screening, *Magic City* stars and director Mitch Glazer will participate in a cocktail reception. Additionally, on Monday morning, Glazer and the series' stars will take part in a moderated poolside discussion called "Coffee With *Magic City*."

George was quick to point out that even without Starz-centric events, "NATPE is an important market for us because we focus a lot on the U.S. distribution portion of our business, and NATPE



Sony Pictures Television will be exhibiting aboard boats across the street from the Fontainebleau

gives us a good opportunity to meet with a lot of those cable platforms."

George also noted that, "On the international side, definitely NATPE is more keyed toward the Latin area, but we also see a lot of the European platforms at the market," citing as an example a deal Starz made for *Spartacus* in France last NATPE.

There will be plenty of other activities to keep participants busy, despite the fact that organizers were "careful not to program so much at lunchtime so people don't have conflicts," Feldman said. Nonetheless, a number of executives will participate in leadership sessions and one-on-one chats, including Starz's Chris Albrecht, Lionsgate TV Group's Kevin Beggs, The Cisneros Group of Companies' Adriana Cisneros, NBC Universal's Jeff Shell and Netflix's Ted Sarandos, among others.

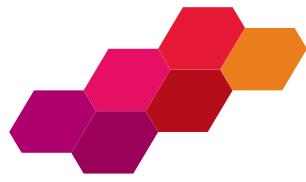
NATPE will kick off with two pre-market screenings (by Fox and Starz) and three parties held on Sunday by Starz, Venevision and FremantleMedia. The NATPE-organized opening cocktail party will follow on Monday night, January 23. The ninth Annual Brandon Tartikoff Legacy Award ceremony will be held at the Fontainebleau on Tuesday. In a ceremony hosted by *Hollywood Access*'s Billy Bush, the awards will honor FremantleMedia North America's CEO Cecile Frot-Coutaz; Fernando Gaitán, VP of Production and Content for RCN TV; Dennis Swanson, president of Station Operations for FOX Television Stations; and Matthew Weiner, creator and executive producer of *Mad Men*. Each award recipient will also participate in separate Legacy Talkback sessions throughout the day on Wednesday.

Additionally, the NATPE Digital Luminary Awards will celebrate innovation in new media and will be followed by a champagne toast on Wednesday afternoon, while that night the Greater Miami Chamber of Commerce will host a cocktail celebration to close the event. Each morning, the market will open at 8:00 with yoga and "Coffee With" sessions around the pool at the Fontainebleau Hotel. ●



The Tresor Tower at the Fontainebleau

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Conferences & Event News

Please Don't Recline

It used to be that only inconsiderate people reclined their airplane seats. Now, according to a recent USA TODAY/TripAdvisor survey, 27 percent of responders say, "I have the right to recline." Fortunately, another 27 percent said, "all seats should be non-reclining," while 17 percent stated, "It's rude to recline." Then there are the semi-considerate: "I only recline when sleeping" (15 percent), and "It depends who's behind me" (13 percent).

Not too long ago, a flight from Dulles to Ghana was stopped shortly after takeoff because one traveler got upset when the man in front of him put his seat all the way back, and the two men got into a fist fight.

Airlines such as Allegiant, Ryanair, ANA (All Nippon Airlines) and Spirit Airlines have entire planes with non-reclining seats.

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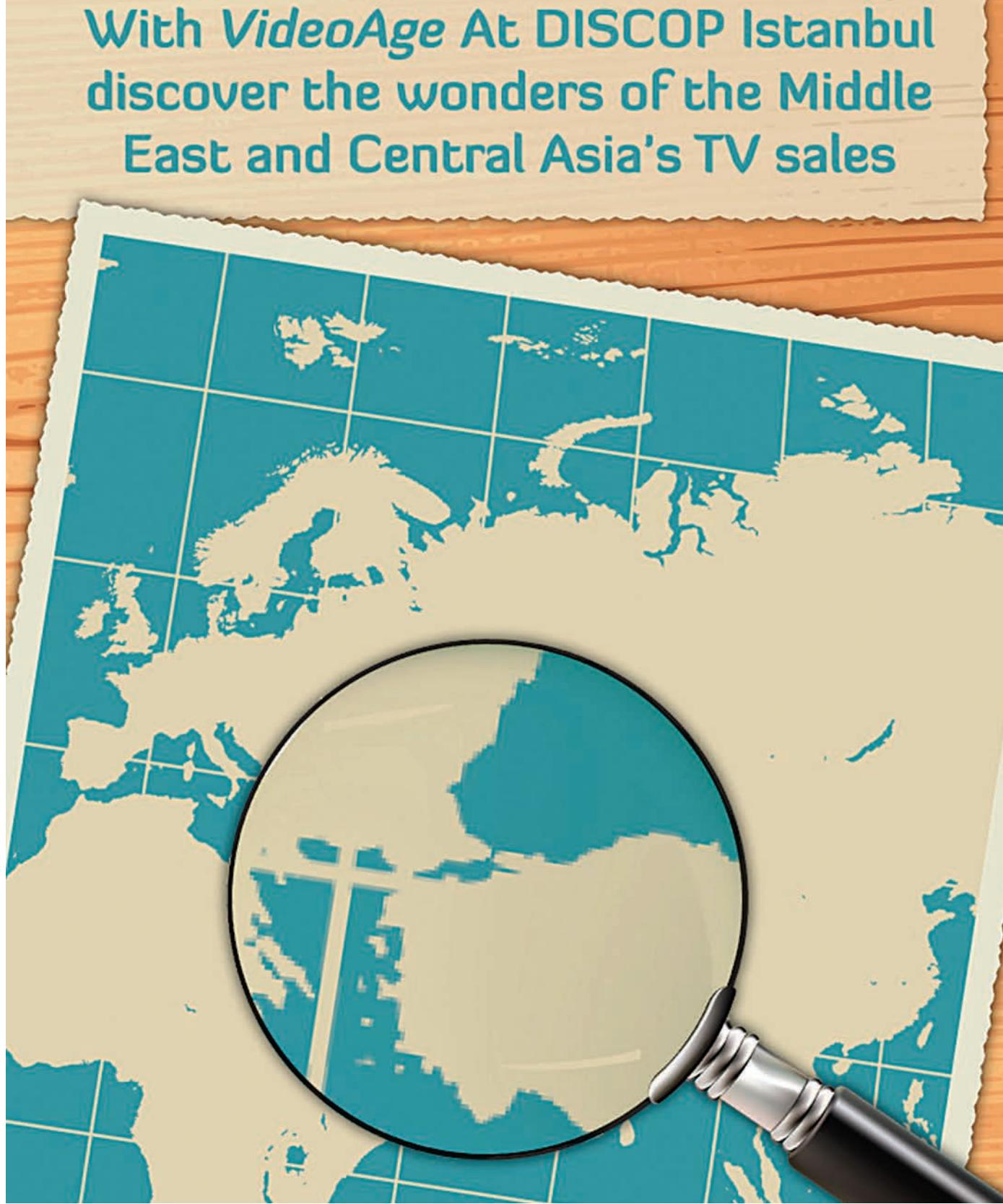
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s our friend Russ Kagan (those who don't know Russ raise their hands!) says when greeting friends, "didn't you get the memo [about wearing the pink Ralph Lauren Polo shirt]?"

Before I get to the issue at hand, let me digress and go on the record about the most popular outfit for the typical stylish international TV executive, of which I'm a convert: Button-down Ralph Lauren Polo shirt (preferably pink) with a Hermes necktie and laced-up leather shoes. If it's cold outside, the coat has to be Burberry, as does the scarf.

Now, on to another sort of memo to the top-level executives who will be delivering speeches at NATPE: Please remember that we are not in the brain surgery business and that the entertainment sector is not a life or death industry.

The Motion Picture Academy, for example, has finally discovered that humor is far more appreciated at the Oscars than profound statements, and comedian Billy Crystal will be emceeing the February 26 telecast. So, it should be crystal clear to NATPE's show runners that a dose of humor could benefit an international market as well.

Lately, I've been listening to speeches by TV execs that are enlightening, informative, profound, thoughtful and visionary, yet...boring, lifeless, and devoid of the kind of humor that makes a speech memorable and inspirational. Today's keynote speakers should model their style after Sir Winston Churchill, who in the midst of a war did not lose his spirit and sense of humor. As he said on November 10, 1942 during the Battle of Egypt: "Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning." Or when he said: "A politician needs the ability to foretell what is going to happen tomorrow, next week, next month, and next year. And to have the ability afterwards to explain why it didn't happen."

How about former Italian Prime Minister and media tycoon Silvio Berlusconi, who, while under investigation for corruption, bribery, embezzlement, Mafia collusion, tax evasion, abuse of power, conflict of interest and sex with an underage prostitute, and in the midst of an Italian-led financial crisis that threatened to bring the European Union down, was quoted as saying (I'm paraphrasing): "Let do the bunga-bunga and call our political party, Pussy Power [Forza Gnocca]."

Or even Cameron Diaz, who, when tensely asked by the bad guys in the thriller *Night and Day* why Tom Cruise's character did not kill her, answered, "Because he doesn't like me."

Besides, today's audience is constantly multi-tasking — another sign of widespread Attention Deficit Disorder (ADD). In the dark conference rooms, the audience signals that a speech is becoming boring when shafts of light emanate from their smartphones, like the blue beams in *Avatar*. Not that having ADD is a bad thing — it's actually helpful to hypochondriacs: when

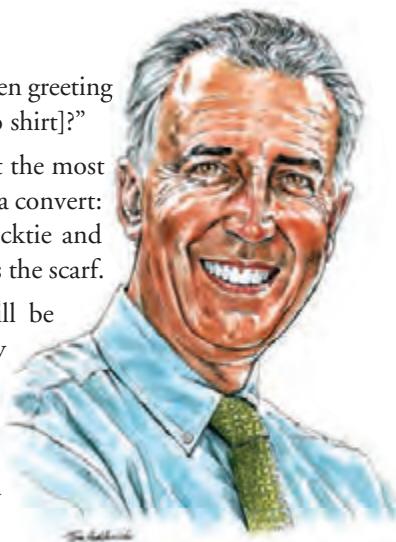
convinced that they're going to die, before calling 911 they quickly get distracted by other thoughts.

The point is that an infusion of humor is so important that even churches are now resorting to comedy in order to amuse dispirited congregations (the so-called "Christian Comedy"). In our case, trade shows such as NATPE should invite comics to introduce a special speaker, have a roast of TV executives (i.e., picking on someone with humor, like the White House journalists do with presidents), or even invite comics from local comedy clubs to explain (possibly without expletives) the facts of life in the TV industry. As long as they understand that bad gay jokes work in Tallahassee, but not in Miami Beach.

We'd all like to see the human side of top-level TV executives, who normally seem remote and aloof, are difficult to reach on the phone and even more unapproachable in person. We should not only be familiar with their temperamental reputation, which usually — despite the help of internal and external PR spin doctors — tends to overshadow their other good characteristics.

In show business, the "show" is an integral part of our business. Let's make sure that trade organizers at least acknowledge it with humor.

Dom Serafini



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